

BUSINESS ITEMIZER

PLEASE COMPLETE THE QUESTIONNAIRE THOROUGHLY ANSWERING ALL QUESTIONS THAT APPLY TO YOU. THIS QUESTIONNAIRE IS INTENDED AS A PRE-APPOINTMENT ORGANIZER. FOR ADDITIONAL BLANK FORMS, VISIT www.orourketax.com

TAXPAYER NAME _____ BUSINESS NAME _____
PRINCIPAL BUSINESS, INCL. PRODUCT OR SERVICE _____

SOCIAL SECURITY # _____ EMPLOYER ID #(if applicable) _____

BUSINESS ADDRESS _____ PHONE _____
TYPE OF BUSINESS ENTITY: C-CORPORATION _____ S-CORPORATION _____ PARTNERSHIP _____
SOLE PROPRIETOR _____ LLC _____

GROSS RECEIPTS OR SALES: _____ DOES AMOUNT INCLUDE SALES TAX? YES _____ NO _____
IF YOU RECEIVED FORM 1099K, PLEASE BRING IT ALONG WITH YOUR TAX DOCUMENTS.

COST OF GOODS SOLD:

PRODUCT PURCHASED FOR RESALE _____
MATERIALS PURCHASED TO MAKE PRODUCTS SOLD: _____
MAINTAIN INVENTORY? Yes ___ No ___ PROVIDE: BEG. INVENTORY _____ END INVENTORY _____

EXPENSES: (Provide expense amounts for categories shown. Note separate sections for equipment purchases, vehicle expense, insurance, phone, travel, interest, and office in your home expense.)

ADVERTISING(incl. yellow pages) _____	BANK CHARGES _____
OFFICE SUPPLIES _____	GENERAL SUPPLIES _____
LEGAL & CONSULTING FEES _____	OTHER FEES (Describe) _____
MERCHANT FEES(Cr Card) _____	POSTAGE & SHIPPING _____
SHOP OR OFFICE RENT _____	EQUIPMENT RENT _____
REPAIRS & MAINTENANCE _____	SMALL TOOLS _____
DUES & SUBSCRIPTIONS _____	PERMITS _____
PRINTING _____	UNIFORMS(Not work clothes) _____
SHOP OR OFFICE UTILITIES _____	SUBCONTRACTOR EXPENSE _____
SALES TAX _____	PERSONAL PROPERTY TAX _____
SHOP OR OFFICE REAL ESTATE _____	PENSION PLAN CONTRIBUTIONS _____
EMPLOYEE WAGES _____	EMPLOYMENT TAXES _____

IF WE DO NOT DO YOUR PAYROLL, PLEASE BRING YEAREND PAYROLL REPORTS (940, W3,)

OTHER EXPENSES(List description and amount):

INSURANCE EXPENSE:

FIRE & CASUALTY _____	LIABILITY _____
CAR & TRUCK _____	HEALTH _____
LIFE _____	WORKERS COMP _____

OTHER(Describe): _____

PHONE:

SHOP OR OFFICE _____ CELL PHONE _____ % BUSINESS USE _____
HOME PHONE:(If you have only one phone, no deduction except for business long distance charges.) _____
SEPARATE BUSINESS LINE CHARGE _____ BUSINESS LONG DISTANCE _____

